

OPEN THE MODULE

- Choose **Cost Management -> Online Change Requests**
- This displays the **Manager View** for the module and shows all records.
- To search for a document to modify, use the columns to filter for the data you need. For example, use the Record # column to search for a document, then double-click to open the document.
- To create a new document, click **Add**.

The screenshot shows the PMWeb interface. On the left is a vertical navigation menu with icons and labels: PLANNING, PROJECT FORMS, COST MANAGEMENT (highlighted with a red box), SCHEDULING, ASSET MANAGEME..., WORKFLOW, PORTFOLIO, TOOLBOX, and EXIT. The main area is a grid of modules. Under the 'CHANGE MANAGEMENT' header, 'Online Change Requests' is highlighted with a red box. Below the grid is a data table with columns: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, CONTRACT, COMPANY, CONTRACT CO, and REFERENCE. The table is currently empty, displaying 'No records to display.' Above the table is a search bar with 'Delivery Me*All*' and a 'Projects' dropdown with '5240-N10-16-OAEN - 160AEN - Ne'. A red box highlights a '+' icon in the table's toolbar, used for adding new records.



The phases of Change Management will be captured in PMWeb in two modules: **Online Change Request (OCR)** and **Commitment CO**. Phases to be captured in the modules include:

- Contract Change Request/Authority (CCR/A) – SDA Form 500
- Contractor's Proposal
- Authority Agent Recommendation (AAR) – SDA Form 501
- Change Order – SDA Form 503
- Construction Change Directive (CCD)
- Contractor Claim Notice

ADD INFORMATION

- Complete all relevant information about the change in the Header section (top portion of the screen). Any field with an asterisk is a required field.
- Be sure to select the correct document type in the **Type** field.
- Click the **Save** button when finished.

Navigation bar containing icons for menu, refresh, search, save (highlighted with a red box), add, delete, email, print, and power.

MAIN

Company	V204532 - Dobco, Inc.
Project*	5240-N10-16-OAEN - 160AEN - NewG
Commitment*	Dobco, Inc. - HU-0029-B01 - Design
Description	Underground Storage Tank
Contract #	HU-0029-B01
Record #*	001
Status / Revision	Draft
Type	CCR/A
Category	D-B-E
Post As	Revised Scope
Commitment CO	

REQUESTED	
Date	05-22-2023
Date Received	
Cause	Diff. Site Conditions
Received By	
Description of Claim/Sc...	

USER DEFINED FIELDS	
School Name	
PMFCM	
District Name	
Project Manager	

CHANGE REQUEST RECAP	COSTS	DAYS
Original Value	\$0.00	0
Approved Changes	\$0.00	0
Revised Value	\$0.00	0
This Request	\$0.00	0

Click **Add** to enter the preliminary information in the bottom of the screen. Enter the information on the peach-colored line that displays. Enter the Description, Ext Cost (when applicable), Cost Code and any Notes required. Click the **Save** button when done.

Drag a column header and drop it here to group by that column

Edit Selected Lines **+ Add** Add Items Delete Refresh Use Units Export To Excel Paste From Excel Layouts

LINE #	ATTACHMENTS	DESCRIPTION	ITEM	EXT. COST	COMMITMENT LINE	COST CODE	CCO ID	NOTES	DAYS

No

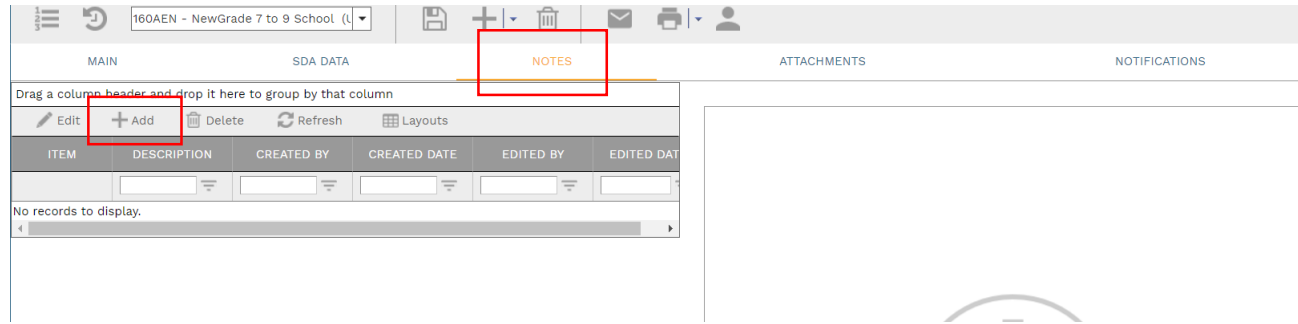
Drag a column header and drop it here to group by that column

Save Cancel

LINE #	ATTACHMENTS	DESCRIPTION	ITEM	EXT. COST	COMMITMENT LINE	COST CODE	CCO ID	NOTES	DAYS
		Underground Storage Tank		\$0.00		030-CS0001-000001			0

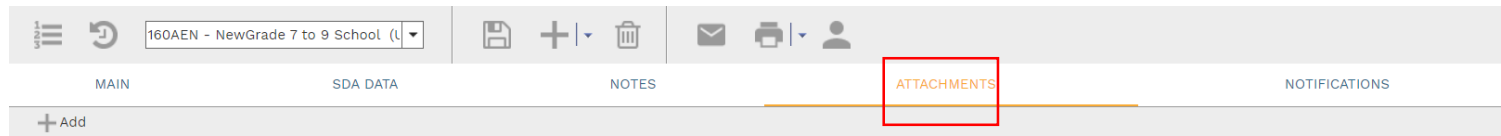
ADD ADDITIONAL NOTES

- Click **Add** on the **Notes** tab to add additional notes as needed. Click the **Save** button after each entry.



ADD ATTACHMENTS

- Drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click the **Save** button when finished.



- Additionally, a report should be printed for each phase of Change Management. Click the **printer icon** in the header section and select **BI Reporting**.

The screenshot shows a software interface with a 'REPORTS PREVIEW' window. The window has a toolbar with icons for close, print, refresh, and view. Below the toolbar is a table with the following data:

REPORT	RECORD TYPE	DEFAULT
Online Change Request	Online Change Request	
Online Change Request Form	Online Change Request	
SDA_OnlineChangeRequestForm	Online Change Request	✓

Below the table is a small input field containing the number '1'. To the right of the table is a preview of the 'Online Change Request Form' document. The document header includes the logo of the State of New Jersey Schools Development Authority and the title 'Online Change Request Form'. Below the header is a table with project details:

Project Name :	160AEN - NewGrade 7 to 9 School (Union City)	Date Received :		Workflow Status :	Draft
Contract # :	HJ-0029-B01-Design Build	Company :	Dobco, Inc.	Commitment CO :	-
Record :	001	Revision :	0	Change Event :	-
Description :	Underground Storage Tank	Requested Date :	05-22-2023	Cause :	Diff. Site
Category :	D-B-B				

Below this table is a summary table with the following data:

Line #	Item Code	Description	UOM	Quantity	Unit Cost	Ext. Cost	Commitment Line	Cost Code	Cost Type
1		Underground Storage Tank		1.00	\$0.00	\$0.00		030-C30001-000001	
				1.00	\$0.00	\$0.00			

At the bottom of the preview, it says 'Run Date: 5/22/2023 3:43:10 PM' and 'Page 1 of 1'.

Select **SDA_Online Change Request Form**, then select **Print to PDF**. Save this report in a desired location. Return to the Attachments tab and add this report to your list of attachments.

CREATING A FINAL CHANGE ORDER

- When all preliminary phases of Change Management are complete, a final Change Order can be created. Change the **Category** field in the Header section to **Change Order**. Click the **Save** button to continue.

A screenshot of a web application interface. At the top, there is a 'Submit' button. Below it, a 'Category' dropdown menu is open, showing a list of options: '-- Select --', 'AAR/RON', 'Allowance Authorization', 'CCD-Authorization', 'CCD-ValueTBD', 'CCR/A', 'ChangeOrder', and 'Contractor Proposal'. The 'ChangeOrder' option is highlighted in yellow, and a red arrow points to it from the left. The background shows a 'Workflow' tab and a text area with the text 'Approval Request: Online Change Requests 001' and 'has been Submitted for approval by'.

- Click the **Workflow** tab and click the **Submit** button. This document will be reviewed for correctness prior to the creation of the Change Order. Those parties involved in the workflow review are established on a project-by-project basis. Add **Comments** as needed and click the **Save** button. Individuals who are part of the workflow approval will receive a notification to log in the system and review the workflow for approval. After document receives final approval, it will be submitted for processing by the SDA's Central Processing Unit team.

A screenshot of the 'Workflow' tab in the system interface. The 'Workflow Actions' section is visible, containing a 'Submit' button (highlighted with a red box) and a 'Save' button (also highlighted with a red box). The 'Email Preview' section shows the subject 'PMWeb Approval Request: Online Change Requests 001' and the email body text: 'A document has been Submitted for approval by Jennifer Irizarry.' Below this, there is a 'Workflow Document Information' section with the following details: '- Document type: Online Change Requests' and '- Project Name: 130ACL - Camden H.S.'. A red arrow points to the 'Comments' field, which is currently empty. The 'Add CC' field is also visible at the bottom.